

E - ORDERS

FOR

CH 13 TRUSTEES

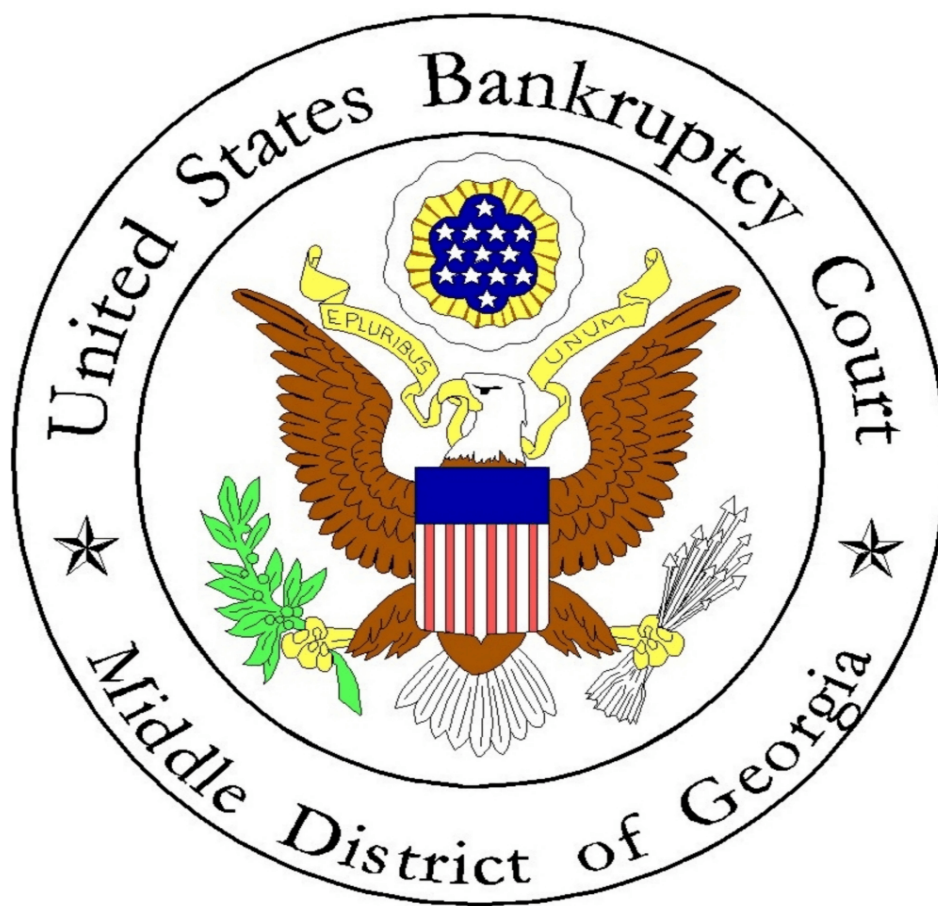


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1. Introduction

E-Orders is a web-based application developed by the U.S. Bankruptcy Court for the Western District of Texas for electronically submitting, routing, reviewing, disposing, and docketing orders in conjunction with CM/ECF. It is a fully integrated system that allows attorneys and trustees to submit orders electronically and provides judges and court staff with the ability to process and sign these orders. Among the obvious benefits of this integration, attorneys using CM/ECF do not have to learn new software to submit orders to the court, and court staff can handle motions and orders with the same program. E-Orders requires a minimal amount of new data entry since it can access most of the pertinent case-related information (case title, related document, description, etc.) from the CM/ECF database.

E-Orders was designed to be flexible so that courts can use its many features in a variety of ways. For example, access to incoming orders can be easily configured, as well as the number and types of “folders” where the orders are routed. The application has enhanced features such as adding notes to alert the judge about problems or simple reminders, and filters to select the type of orders to review or sign. Security features are also present to provide levels of access to authorized users and ultimately to prevent anyone but the judge from electronically signing the orders. Also, there is a program feature for judges to handle and sign orders when covering for a fellow judge.

Signing orders is only one of the options available to the judge once an order has been forwarded to them. In addition to signing the order, the judge can decide to deny the relief or render the order withdrawn or moot, in which case the application places a specialized digital stamp, such as, “Denied for the reasons orally stated on the record at the scheduled hearing date,” along with the judge’s electronic signature. This feature is flexible enough to allow the judge to have multiple individualized digital stamps.

In addition, E-Orders has the ability to upload, route, and sign orders in batches. Chapter 13 trustees can upload a number of standard orders in batch. Court staff can review and route these orders in batch to the judge for signature. The judge can then decide to sign these orders in batch. For example, if your Chapter 13 confirmation orders are form orders and the real review is done at confirmation, the judge can decide to sign a batch of these orders all with one click. This can be a tremendous savings in time and effort.

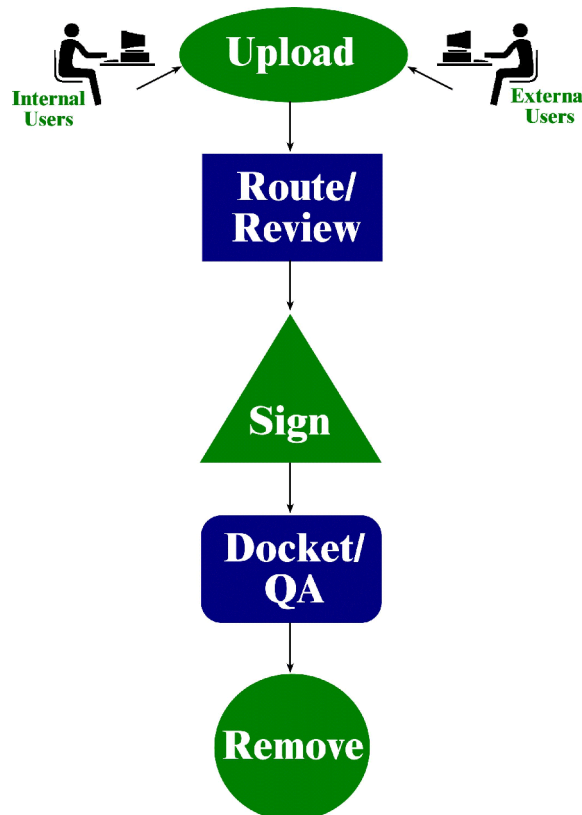
This User’s Guide explains how to operate the E-Orders application for both internal and external users. The second section of this manual provides an overview of the process of handling orders from uploading the proposed order to noticing the signed orders. Each section thereafter corresponds to a major component of the E-Orders application and provides the user with instruction for using the program.

As stated earlier, this application and documentation was developed by US Bankruptcy Court, Texas, Western. Some screens may vary slightly with the actual screens you will see when using E-Orders.

2. E-Order Process Overview

E-Orders manages order processing from the submission of a proposed order, to reviewing and signing the order, to docketing and noticing of the order. The process in each court may vary, but the system is flexible enough to accommodate variations. The basic process is as follows:

- Proposed orders are uploaded into E-Orders by either internal or external users.
- Orders are then electronically routed and reviewed by the necessary staff.
- Once the order is ready for signature it goes to the judge, who can sign the order electronically.
- After the order is signed, it is manually docketed by court personnel. A quality assurance review is also incorporated into this step in the process.
- Lastly, the application administrator sets up and maintains the user accounts, security, and access to the system.



3. Uploading Orders

Overview

Uploading orders into the E-Orders application begins the process. Orders can be uploaded by two types of users—external and internal. The external users are the attorneys and trustees that work with the court and the internal users include all court personnel. Attorneys can only upload orders one at a time. Chapter 13 trustees and internal users can upload orders in batches, as well as one at a time.

Orders can be uploaded in both bankruptcy cases and adversary proceedings. The orders must be associated with a specific case and related document except for batch and *sua sponte* orders, which can not be associated with a document. *Sua sponte* orders can only be uploaded by court users.

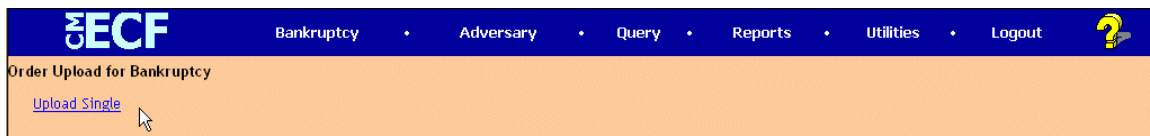
All orders must be converted to PDF format before uploading them into the application.

Uploading Orders Related to Bankruptcy Cases

To upload an order related to a bankruptcy case, open CM/ECF and click **Bankruptcy** in the CM/ECF Main Menu bar. The Bankruptcy Events Screen appears (attorney version shown.)



Click **Order Upload** and the Upload Type Selection screen appears (attorney version shown.)



Upload Single

The **Upload Single** feature permits you to upload one order at a time. When you select **Upload Single**, an Enter Case Number screen appears for you to input the case number for the proposed order.

The screenshot shows the 'Upload a Single Order' screen. At the top is a blue navigation bar with the ECF logo and links for Bankruptcy, Adversary, Query, Reports, Utilities, and Logout. Below the navigation bar, the title 'Upload a Single Order' is displayed. The main content area has an orange background. It features a 'Case Number' label followed by a text input field containing '04-50036'. To the right of the input field, examples are provided: 'Examples: 99-12345, 1:99-bk-12345 or 1:99-bk-12345'. Below the input field are two buttons: 'Next' and 'Clear'.

After typing in the case number click **Next**. The Related Document Number screen appears.

The screenshot shows the 'Upload a Single Order' screen after clicking 'Next'. The title 'Upload a Single Order' is still present. Below it, a hyperlink '04-50036-rbk Billy Bob Debtor' is visible. The main content area has an orange background. It features a 'Related Document Number' label followed by a text input field. To the right of the input field, a note says 'Enter the document number of the related matter for which the order is being submitted.' Below the input field is a note: 'Note: If you don't know the related document number, click on **Next** to continue.' At the bottom are two buttons: 'Next' and 'Clear'.

If you know the related document number, type it in the space provided and click **Next**. The Upload a Single Order screen appears. If you do not know the number of the related document, there are two ways to get the information. First, you can click the **case number hyperlink**, which produces a docket report for the case. External users should note that when clicking this link the PACER login page will appear since there are costs associated with looking at the docket report. The second method is to click **Next**. A search criteria screen appears.

The screenshot shows the 'Upload a Single Order' screen after clicking 'Next' without a related document number. The title 'Upload a Single Order' is still present. Below it, the text 'Select the category to which your event relates:' is displayed. A dropdown menu is open, showing a list of categories: 'ans', 'answer', 'appeal', 'cmp', 'court', 'crbatch', 'crltrd', 'misc', 'motion', and 'order'. The 'motion' category is currently selected and highlighted. Below the dropdown menu are two sets of input fields: 'Filed' followed by a text input field and 'to' followed by another text input field, and 'Documents' followed by a text input field and 'to' followed by another text input field. At the bottom are two buttons: 'Next' and 'Clear'.

The search criteria screen contains three selections. You must select a related

document category. Your selection will almost always be motion. Optionally, you can enter a filed date and/or document number range to help narrow the search results. The dates are entered in the following format: mm/dd/yyyy. After you have made your selections click **Next**. A search results screen displays.

The screenshot shows the ECF system interface. At the top is a blue navigation bar with the ECF logo and links for Bankruptcy, Adversary, Query, Reports, Utilities, and Logout. Below the navigation bar, the page title is "Upload a Single Order". The main content area has an orange background and contains the instruction "Select the appropriate event(s) to which your event relates:". There are two search results listed, each with a checkbox, a date, a document number, and a description. The first result is dated 11/17/2004, document number 2, and describes a "Motion to Extend Time File schedules & statements filed by David Williams for Debtor Billy Bob Debtor (Williams, David)". The second result is dated 12/02/2004, document number 4, and describes a "Motion to Avoid Lien with Vaporware, Inc (20 Day Objection Language) filed by David Williams for Debtor Billy Bob Debtor (Williams, David)". At the bottom of the list are "Next" and "Clear" buttons.

If the document your order relates to is not shown, click your browser **Back** button to return to the search criteria screen. Change your search criteria for a wider/different search. If only one document is found, it will automatically be selected for you. If the document appears in a list, click the check box to select then click **Next**. The Upload a Single Order screen appears.

The screenshot shows the ECF system interface. At the top is a blue navigation bar with the ECF logo and links for Bankruptcy, Adversary, Query, Reports, Utilities, and Logout. Below the navigation bar, the page title is "Upload a Single Order". The main content area has an orange background and contains the following information: "Case Number: 04-50036-rbk", "Case Name: Billy Bob Debtor", "Related Document Number: 4", and "Related Document Description: Motion to Avoid Lien". Below this information are several form fields: "Order Type" (a drop-down menu with "Expedited" selected), "Hearing Date" (a text box with examples "03/19/2002 or 03/19/02"), "File to Upload" (a text box with the path "O:\Ecf-Attorney Training\training\test case up" and a "Browse..." button), "Folder" (a drop-down menu with "J/Sign" selected), and "Notes" (a text box with the text "this is a note"). Below the form fields is a note: "Note: You can only upload files with a .pdf extension. If you use Adobe Acrobat Writer version 3 or 4 to convert orders to pdf, your orders should be prepared using the Courier, Helvetica, or Times New Roman font (regular, bold, italic, and bold italic). If you use Adobe Acrobat Writer version 5, your orders should be prepared using the Arial, Courier, or Times New Roman font (regular, bold, italic, and bold italic). Other fonts will not process correctly through the court's noticing center." Below the note is an attention message: "Attention!! Submitting this screen commits this transaction. You will have no further opportunity to modify this submission if you continue." At the bottom of the form are "Next" and "Clear" buttons.

NOTE: The **Notes** and **Folder** selections only display for court users.

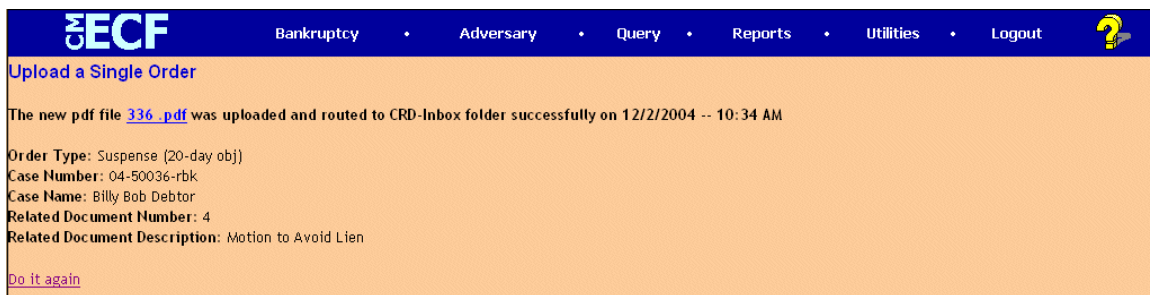
First, confirm the **Case Number**, **Case Name**, **Related Document Number**, and **Related Document Description** shown at the top of the screen. Next, select the **Order Type** from the drop-down list. The **Order Type** selections are:

Ex Parte (no hearing required)

Expedited
Hearing Held
Hearing Scheduled
Suspense
Other

If you select ***Hearing Held*** or ***Hearing Scheduled*** as the **Order Type**, you must fill in the **Hearing Date** field.

The **File to Upload** field is where you enter the path and filename of the proposed order PDF file. Click the **Browse** button to locate and select the file. You can also type the path and filename in the box. Please make sure the PDF file is correctly formatted - if incorrectly formatted the order may not process correctly through the courts noticing center. Finally, review all the information carefully and if correct click **Next**. A submission confirmation screen appears. You can view the uploaded PDF by clicking the hyperlink.



Upload an Additional Order or Replace an Order in Upload Single

In some instances an uploaded order may need to be replaced or a second order uploaded. For example, the judge might direct an attorney to submit a revised order. The attorney submitting the original proposed order can replace his submission with the revised order. An order cannot be replaced if the original order has already been routed to the Judge. In this case, the application will let you know your order cannot be replaced. An external filer cannot replace an order uploaded by a different filer.

The process of replacing an order or uploading an additional order is essentially the same as the upload process described in this section. After selecting the document number, a Replace Order screen appears that will let you know an order(s) already exists for this document number and gives you the option to create a new order or replace an existing order.

Warning: The following order(s) already exist for the same case and related document.

Case Info	Related Doc	Order
04-50036-rbk Billy Bob Debtor Ch 13	4 Motion to Avoid Lien Filed: 12/02/2004	336.pdf By David Williams 12/02/2004

☐ Upload another order
☒ Replace the original order(s)
☒ Replace the order [336.pdf](#)

Next Clear

Choose whether to add another or replace the current order by clicking the appropriate radio button. If you choose to replace the current order, designate which order you are replacing by clicking the check box next to the corresponding order number. You can click the PDF hyperlink to review the PDF files to help determine the order to be replaced. You can check multiple boxes to replace more than one order at a time. After making your selections, click **Next**. The Upload a Single Order screen appears. Add the necessary information the same way as in Upload Single. Then finish the upload process as described. A confirmation screen lets you know the process was completed successfully.

Upload Batch

The Upload Batch feature allows Chapter 13 trustees and court personnel to upload multiple orders at one time. The application ensures Chapter 13 trustees can only upload orders for cases assigned to them. You must have the case number and PDF filename for each order before beginning the batch upload process. Each batch uploaded must contain the same Order Type and Order Description for each order in the batch. Trustees can upload orders with different descriptions to the same case.

After selecting **Order Upload** from the Bankruptcy Events screen, click **Upload Batch** on the Upload Type Selection screen. An Upload Batch Orders screen appears prompting you to enter the **Order Type**; **Order Description**; **Hearing Date**, if appropriate; and the **Case Numbers**.

Upload a Batch of Orders

Order Type:

Order Description:

Hearing Date: Examples: 03/19/2002 or 03/19/02

Case Number(s):

Next Clear

The **Order Types** are the same as those listed in Upload Single. If you select the **Order Type** of *Hearing Held* you must fill in the **Hearing Date** field or you will not be able to

finish the upload process. The **Hearing date** must be the same for each order in the batch. The **Order Descriptions** are:

***Order Confirming Chapter 13 Plan
Payroll Deduction Order***

Next, type in the case numbers related to each order in the format xx-xxxxx. Press **Enter** after each case number to create a list of case numbers. There is no limit to the number of cases that can be listed, but we recommend that you enter no more than 50 numbers at a time. (If you make a mistake you will have to retype the entire list.) After typing the case number list, click **Next**. The Batch Orders PDF Selection screen appears.

ECF Bankruptcy • Adversary • Query • Reports • Utilities • Logout ?

Upload a Batch of Orders

04-50036-rbk Billy Bob Debtor

04-50037-rbk Pathetic Filer

Note: You can only upload files with a .pdf extension. If you use Adobe Acrobat Writer version 3 or 4 to convert orders to pdf, your orders should be prepared using the Courier, Helvetica, or Times New Roman font (regular, bold, italic, and bold italic). If you use Adobe Acrobat Writer version 5, your orders should be prepared using the Arial, Courier, or Times New Roman font (regular, bold, italic, and bold italic). Other fonts will not process correctly through the court's noticing center.

Attention!! Submitting this screen commits this transaction. You will have no further opportunity to modify this submission if you continue.

For each case number, enter the path and filename of the proposed order PDF file either by clicking the **Browse** button to locate and select the file or typing the complete path and filename in the box. Please make sure the PDF file is correctly formatted - if incorrectly formatted, the order may not process correctly through the courts noticing center. After attaching all the files, review all the information carefully. Once you click **Next**, you will not have an opportunity to modify the submission. After you click **Next**, you will receive a confirmation screen.

ECF Bankruptcy • Adversary • Query • Reports • Utilities • Logout ?

Upload a Batch of Orders

The following orders were uploaded and routed to CRD-Inbox folder successfully on 12/2/2004 - 10:52 AM

Order Type: Hearing Scheduled

Order Description: Order Dismissing Chapter 13 Case

Hearing Date: 12/15/2004

04-50036-rbk, Billy Bob Debtor

04-50037-rbk, Pathetic Filer

Please click on **Next** button to view the uploaded documents.

If you would like to view the uploaded documents click, **Next**. You can click each new PDF file hyperlink to view the uploaded order.

ECF Bankruptcy • Adversary • Query • Reports • Utilities • Logout ?

Upload a Batch of Orders

04-50036-rbk Billy Bob Debtor new PDF file: [337.pdf](#)
04-50037-rbk Pathetic Filer new PDF file: [338.pdf](#)

[Do it again](#)

Replace an Order in Batch

In some instances a batch uploaded order may need to be replaced. However, an order cannot be replaced if the original order has been routed to the judge. If this is the case, the application will let you know the order cannot be replaced at this time. The application ensures Chapter 13 trustees can only replace orders for cases assigned to them. The process is the same as in Upload Batch, except after completing the screen and clicking **Next**, a warning screen appears informing you that you are about to replace an order. You can review the original PDF by clicking the hyperlink to ensure it is the one to be replaced.

ECF Bankruptcy • Adversary • Query • Reports • Utilities • Logout ?

Upload a Batch of Orders

Warning: Orders already exist for the same case numbers. The original orders will be replaced if you continue the submission.

04-50037 [338.pdf](#)
04-50036 [337.pdf](#)

If your intent is to replace the orders, click **Next** and continue with the Batch Upload process. You will be prompted to attach the new PDF files. When this is completed, a confirmation screen appears with the option of viewing the newly uploaded order.